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ABSTRACT

This guide provides information on providing outplacement services for terminated employees and advice on how to terminate employees. It includes a definition of outplacement, criteria for selecting outplacement providers, and guidelines for monitoring the delivery of outplacement services. The Stevens Model of Career Development and the services provided by the Worklife Network are used as examples. A chart for the separation process is provided, along with suggestions for the role of human resources staff in the termination and outplacement process. A bibliography lists 10 suggested resources. (KC)

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SEPARATION & OUTPLACEMENT:

Managing Both Effectively

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Sydney

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The Worklife Network

(Established in 1979)

Paul Stevens, Worklife Director

The term 'worklife' was chosen to reflect our continuing work in research, counselling, training and publishing material which relates to improving people's enjoyment from their employment activities and other aspects of their lives.

We do not accept the traditional view of career support—that is, to help people acquire satisfaction only from their working hours. We consider that occupational satisfaction can only occur when a person's total needs are included in the assessment of what is lacking and what needs to be done to increase inner well-being, improved relationships with others—colleagues and loved ones—and effective performance both at work and non-work activities. 'Life' in Worklife means our focus is on the total person. 'Work' relates to the roles in which the person is involved (employee, student, homecarer and citizen) and their environments (workplace, educational institution, home, community).

Ours is a holistic approach—in our counselling and career and life management training workshops we consider all features of a person at the same time as maintaining respect for personal privacy by use of non-threatening inquiries into thoughts and circumstances.

Worklife has highly skilled career practitioners throughout Australia and New Zealand as well as in USA, The Netherlands, Sweden and Singapore. For information on your local Worklife Network member, contact Worklife Head Office in Sydney:

Tel: (02) 9968.1588 Fax: (02) 9968.1655

Email: worklife@ozemail.com.au

Website: http://www.ozemail.com.au/~worklife

Counselling — Career Training — Career Systems Design

Outplacement Defined

Scope of outplacement activities

Outplacement is a significant human care activity calling upon knowledge and skills from most aspects of the human resource profession. The knowledge base to carry out these activities effectively is complicated by the fact that a provider needs to be familiar with—and preferably trained in—adult career development theory and practice, psychology, behavioural science, employment law and sociology.

In addition, the provider needs a thorough understanding of the current labour market and awareness of the supply and demand factors for a wide range of occupational categories.

All the above requirements are not to find a job for the employee or ex-employee assigned to the outplacement provider. The role of the provider is to bring this knowledge to facilitate the person exploring themselves, exploring their career options, making their own decisions and coaching the person to make their own transition. Also, to teach how to undertake job search strategies which result in the resumption of income-generating work.

Prerequisites of delivery

The provider needs consulting, counselling, training and facilitation skills of the highest order. Also essential is a thorough knowledge of the range of individual career assessment 'tools' and of their administration and interpretation. This is so that the right selection of tools can be made to suit the individuality of the person and help them make their own career direction choice.

Career decisions taken by people under the care of outplacement providers are, for most individuals, among the most significant of their lives. Consequently, the choice of outplacement consultancy is crucial and incurs, in the process, a moral responsibility for ongoing care and support.

Similarly, once the choice of provider has been made, the continuing management of the consultancy provider to ensure that what has been engaged to be delivered is being delivered is also a prerequisite of effective management of the redundancy process. Once redundant employees have been assigned, it is not a situation of

'out of sight, out of mind and responsibility'.

In outplacement there are no absolute rules of procedure, only principles and ways of approaching individuals made redundant and their situations. To help employers get the best practice and value from their pur-

chase of outplacement services, the following guidelines have been prepared.

Benefits for employers

The selection and management of outplacement providers have the intention of securing the following benefits for an employer:

- Good external public relations will follow from the demonstration of the employer's concern.
- The ability to focus on the management of the continuing business and the changes caused by the separation of experienced staff.
- The decision to release employees can be taken in the confidence that any harmful effects on individuals will be mitigated or minimised.
- Confrontations—even legal actions—can be avoided and morale restored when people accept that redundancy need not mean long-term unemployment when skilled help is assigned.
- A well managed, well-reputed process will reduce the likelihood of competent employees—the 'survivors'—resigning, knowing that they are working for an employer worth staying with.

Figure 1: Outplacement Provider Benefits

- Help with separation procedure
- Achieve re-employment
- Reduce emotional trauma
- Protection of internal morale
- Protection from legal suit
- Promotion of favourable public image
- Secure knowledge and facilities of professionals

Working definition

Outplacement is the process where an individual or individuals compelled to leave, or who elect for voluntary separation, is / are given support and counselling to assist in achieving the next stage of their career. It is a supportive and empowering process. The responsibility for choosing, pursuing and securing a new future remains the responsibility of the individual, with the outplacement service providing support and skilled guidance throughout each stage of the individual's transition process.

As the outplacement providers do not 'place' anyone into employment, a better term would be 'career transition support providers'.

The provider's staff or subcontractors

The provider's team of support personnel need to be:

a) knowledgeable about facts (labour market situation, career assessment instruments, etc.); and

b) skilled in counselling one-to-one and / or group training situations.

In relation to the latter, the level of skill an employer should expect to be available through the provider is the capability to help redundant persons:

- understand and accept the change in their circumstances as a fact of life.
- surface, recognise and accept their feelings and stress related to this change.
- complete a structured and comprehensive self-analysis of their transferable skills, motivated abilities, desired new learning and personal values.
- be empowered to take control of their own job finding and career pathing responsibility.

A working model

There are a number of Models for helping adults make career transitions. One of these models devised within Australia follows as Figure 2. This Model can be referred to by an employer's staff in conjunction with Figure 3 Support Services Model which provides a précis of the minimum services that an outplacement provider should be capable of providing. Use these Models as reference:

a) when defining the terms of expectation when soliciting proposals for this service;

b) when selecting an outplacement provider; and

c) when monitoring the delivery of outplacement services.

Figure 2: Stevens' Model of Career Development

The Career Journey requires a person goes through six key stages in making the transition effectively:

Stage One: Self-Assessment

Assess Physical and Psychological Health — Clarify Issues and Concerns — Assemble an Information Base through Structured Analysis — Review Current Job Effectiveness — Check Employment Experiences — Abilities — Interests — Values — Financial Needs — Primary Wants — Employment Environment Preferences — Lifestyle Considerations

↓

Stage Two: Interpreting Data

Analysis — Transferable Skills Identification — Career Requirements Developed — Resolve Ambiguities — Lifestyle Integration — Monetary Needs and Considerations — Barriers to Overcome — Identify Perceived and Real Constraints

↓

Stage Three: Opportunity Awareness

Collect Information — Research — Organisation Information Gathering — Reality Testing — Cultivate a Network — Mentoring — Evaluate Results — Select Career Action(s) Options

↓

Stage Four: Decision Learning

Evaluate Career Action Options — Trade-offs — Decide on Goals — Prepare Career Action Step Proposal

↓

Stage Five: Transition Training

Schedule Career Transition Actions — Rehearse for Negotiations — Develop Strategies for Job Search Success — Check Job Hunt Preparation — Prepare Résumés and Application Letters — Interview Techniques — Audit Career Transition Progress

↓

Stage Six: Transition Accomplished

Review of Completed Career Action Steps — New Career Fit Review — Assessment of Well-being

Figure 3: Support Services Model

As a person proceeds to resolve their own career action plan and implement it, the outplacement provider supports the person with the following facilities at each Stage and in the following sequence:

Stage One: Self-Assessment

Provide Resources for Self-understanding — Self-help Workbooks —Assessment Instruments — Diagnostic Aids — Career Options Planning Workshop or a Series of Helping Meetings

↓

Stage Two: Interpreting Data

Provide Opportunity for Confidential Discussions — Counsellor Help — Check for Realistic Appraisal of Employment Potential

↓

Stage Three: Opportunity Awareness

Link Person with Appropriate Resources and People — Career Information Resources Centre — Provide Occupational Job Content Skill / Competency Definitions — Job Vacancy Bulletins

↓

Stage Four: Decision Learning

Train in Career Decision-making Methods — Communicate Realities of Career Options — Provision of Mentor Assistance — Documentation of Career Action Resolution

↓

Stage Five: Transition Training

Provide Support to Realise Employment Goal — Job Search Coaching — Development Needs Analysis — Skill Gap Assessment — Interview Training — Résumé Writing Help

↓

Stage Six: Transition Accomplished

Learning from Outcomes — Report Outcome to Engaging Organisation

Criteria for Selecting Providers

The minimum criteria for selecting outplacement providers are:

- The provider has staff who can demonstrate that they have the requisite knowledge for and understanding of the process described. Proof should be sought of this.
- The staff to be assigned to provide support must be able to demonstrate capabilities in cultural diversity, ethnic and gender issues, understanding and empathy with people who may be distressed.
- Labour market knowledge.
- If psychological questionnaires are utilised by the provider, a guarantee should be provided that no individual will be compelled to undertake them unwillingly and proof sought that the provider is qualified to administer them.
- The provider commits to maintaining support to individuals until a outcome satisfactory to the individual is achieved however long this may take on a fee basis approved in advance.
- The provider can present a Report Format and / or Checklist which will indicate the progress being made with and by each individual assigned to their care to be submitted each month to the engaging employer.
- As separation monies can be quite considerable, the provider should be expected to source quality independent financial advice built around their particular needs and aspirations by nominated and legally qualified financial management advisers. Such advisers are not to be limited to investment advisers but be capable of understanding and advising on family type budget management situations. A set number of hours per individual should be provided and funded for financial guidance.
- Office accommodation and / or group training facilities are available for the work to be carried out and access by separated people is uninhibited during the span of business hours.
- A comprehensive Career Self-Help Reference Library is available for separated persons to access which includes, for example, databases on occupations, labour market demand, employers' details, recruitment agencies for both local and interstate labour markets.
- Major employer directories are available in up-to-date editions, such as KOMPASS and JOBSONS Gazette.

- Services for photocopying, correspondence, printing, telephone and fax facilities at no charge to individuals.
- A list of other experts in the community and their contact details for issues that may arise in helping individuals for when referrals to other resources are appropriate and need to be made.

Figure 4 illustrates the most frequent training needs observed in outplaced clients by The Centre for Worklife Counselling over seventeen years.

Figure 4: Client Transition Training

Most frequent needs:

- Life management re-evaluation
- Career re-direction help
- Planning and job hunt management
- Job seeking techniques
- Negotiation skills
- Self-confidence and assertiveness training
- Conflict resolution methods
- Knowledge of effects of colour of clothes
- Spoken word delivery (self-presentation skills)
- Stress management techniques

Suggested questions for evaluating outplacement providers' submissions and personnel

The length of time an outplacement provider has been delivering such services is a significant but by no means the sole indicator of reliability or an indicator of its services standards.

Career decision assistance

- How do you go about helping a client decide between two or more career direction options? (Seek here evidence that there is an organised way for helping a client weigh up the pluses and minuses for each option, rather than an intuitive approach—perhaps by a consultant-designed questionnaire the client completes.)

- Do you use a workbook for client self-assessment, exploration and decision making:
  a) designed overseas?
  b) designed locally?
- Does the workbook content provide for cultural diversity and/or special needs, e.g. women, medically impaired people, those with limited English fluency?
- Do you make available computer-based career guidance and job search software systems? Which ones? and why?

Knowledge of labour market

- Ask which employment agencies have the best facilities for placing labour classifications common to the terminating people?
- What do you regard are the essential differences between job seeking and selection interview processes for jobs within the Public Sector and those prevailing in the Private Sector?

Assessment

- What do you regard as a minimum database of self-knowledge before a client can undertake effective career exploration and career decision making. (Look out for responses which cover skills, values, motivation, perceived constraints, primary needs. Responses which mention only skills indicate the provider is not properly informed or trained.)
- Do you favour self-assessment by the client or assessment by the consultant or counsellor? (This is the best way to find out whether the provider favours the psychologist-assessment approach or has knowledge and experience in administration of self-assessment career assessment instruments.)
- People can be guided to go about career planning in many ways. Which career development theory or model do you favour in most client help circumstances?
- Which psychological questionnaires, career assessment instruments and questionnaires do you use with your clients, and why?

Exploration

- What facilities have you, the provider, for assisting a client develop a list of network contacts?

Responsiveness

Where large numbers are involved:

- Are participant group sizes larger than 12? (The quality of individual client care goes down rapidly for group sizes larger than 12.)
- How does the provider measure progress or otherwise of individual participant when conducting group training?
- Is one counsellor assigned to each client / employee? If so, what back-up service is there when the support person is unavailable?
- Does one counsellor stay with the client throughout the process to successful re-employment? (This is the preferred approach to client management.)

Figure 5: Credentials Facility for Providers

The Outplacement Institute is a non-profit service whose mission is to ". . . build professionalism in Outplacement and achieve recognition for that professionalism." The OP Institute in 1994 first offered credentials in Outplacement to Members and Fellows who had five or ten years of practice and demonstrated through submitted portfolios that they met the standards of the Institute in five areas of Outplacement competency. The OP Institute is jointly sponsored by the International Association of Career Management Professionals, in which individual practitioners are members, and the trade association in the field, the Association of Outplacement Firms International. Representatives from both organisations serve on the Institute's Governing Board. OP Institute credentials are available to all practitioners of Outplacement, not just to members or affiliates of the sponsoring organisation.
PO Box 150759, San Rafael CA 94901, USA
Fax: (415) 459.6298

Portfolio Adviser for Australia and New Zealand: Paul Stevens, Worklife Pty Ltd, Fellow of The Outplacement Institute

Résumé design approach

- What résumé format does the provider favour for helping public sector clients approach private sector?
- On what basis is this decision made? (i.e. Is there any evidence that the provider has surveyed or checked recently with the Private Sector for desirable résumé format for receiving applications?)

Effectiveness of past programs

- Has provider done any follow-up with past client assignments to check efficacy of their career transition support methodology?
- Does the provider measure the individual client's level of career transition knowledge before the support program commences (if so, how?) and subsequently amend their approach to support content or is everybody treated the same? i.e. Is it a packaged program?

Minority groups

- What is the record of the provider dealing with ethnic diversity in client career support? What are their views on the need for different client management approaches?

Fees structure

- What is the provider's approach to fee charging? (Flat fee or reduced charges when a client finds employment within a very short period of commencing the career transition support program?)

Clinical or other issues

- What approaches do you take or how will you know when to assess whether the client should be referred to other authorised providers for clinical type support e.g. in excess stress situations?
- What back-up communication facilities do you have in the event of urgent need for after hours access to a counsellor by the client?

Job hunt

- What actions do you take when a client begins to obtain interviews? (Check here for evidence that the provider does carry out interview debriefing and coaching of clients' interview and negotiation approaches.)

Client self-help support

- What resources are in your Career Library to assist clients at different stages of their transition? (e.g. What software, texts, labour market information?)
- In recent assignments, through which avenues (e.g. job search strategies) were satisfactory outcomes achieved in the main by redundant individuals?
- How many individuals are the provider's counselling and training team members assigned at any given time? (To check quality dilution.)

Figure 6: Differences Between Youth and Adult Support

	Vocational Guidance	Transition Counselling
Aim:	Assessment	Enabling the client's self-determination
Nature:	One-off interview	Series of helping encounters
Aids:	Extensive use of tests	Structured self-analysis / workbooks / career assessment instruments
Focus:	Personal history Education	Feelings, perceptions, self-concept, life management needs
Outcome:	Recommendation	• Increased learning • Self-management of transition

Reporting and evaluation

- What procedures do you follow to keep the engaging employers informed of their ex-employees' progress? Give examples of what you have done on this regard for past employers.
- What do you regard as confidential between you and client and what are you prepared to report back to us so that we can be assured appropriate support is being provided?
- Has the provider Professional Indemnity Insurance? (Giving career and psychological advice to people who are likely to be stressed and anxious requires considerable skill. If things go wrong, the employer should ensure that the provider is protected through insurance in the event of a legal suit and the employer is unlikely to be sued.)
- What makes your range of outplacement services special compared to others? (An overview of Worklife's services is shown in Figure 7.)
- What have been your most recent successes?
- How will you report progress to us?
- What qualifies you and your team to help people in career transition situations?
- Describe difficult situations you have experienced in providing this form of service?
- At what point do you regard your work as completed?

Figure 7: Overview of Worklife's Outplacement Services

Worklife offers the following Resettlement Counselling Services tailored to each client's individual needs rather than using a packaged approach. Our service provides the following for terminating employees:

Resettlement Services and Outputs:

- Re-evaluation of career direction
- Design of a self-marketing strategy to alternative employers
- Guidance in preparing interview-winning job application letters
- Help in designing and writing effective résumés
- Selection interview training including 'body language' tuition
- Extended knowledge of job-seeking techniques other than responding to recruitment advertisements
- Up-to-date realistic information on employment prospects, recruitment practices and procedures
- Evaluation of employment options
- Non-visible help in negotiating new employment terms
- Pragmatic review of her/his personal financial assets, liabilities, and cash flow, and the development of a workable budget
- Stress management training provided where appropriate
- Essentials are provided to compete effectively in the job market

Process:

- Counsellor acts as a catharsis for feelings of strong emotion, frustration, despair, low self-esteem and helps to return the individual to a self-confident person
- The individual is not job searching alone and unaided
- Unfettered down to earth advice is provided independent of any bias
- Emotional support and companionship are provided
- Client confidentiality of personal data is vigorously maintained
- Danger of psychosomatic illness derived from negative attitudes is reduced
- Immediate steps are taken to assist re-employment elsewhere
- Assistance is given which can be used again by individual alone if employment loss recurs
- Research assistance to identify organisations and people whom the job seeker can approach, and guidance in how to carry this out

During the delivery of services by the provider, the competencies in Figure 8 should be clearly demonstrated.

Figure 8: International Association of Career Management Professionals

COMPETENCY STANDARDS

(Published in 1995)

1. **Consulting with Corporate Clients**, including but not limited to:

- managing corporate relationships
- interpreting business / industry trends and issues
- guiding client organisations and people through transition processes
- preparing managers to handle termination meetings
- managing career centres
- reporting status and results to sponsors
- negotiating references guidelines and 'reasons for leaving' statements
- consulting on and providing services to deal with 'survivor' issues
- maintaining confidentiality within legal requirements
- working within ethical standards of the profession

2. **Consulting with Candidates**, including but not limited to:

A. **On an Individual Basis**

- managing the consultant / candidate relationship
- handling special situations such as 'stuck' candidates and candidate dependencies
- problem solving with candidates
- consulting on termination trauma / stress
- motivating candidates through job transition
- identifying candidate 'blocks' and referring to other appropriate assistance
- identifying support systems and training candidates to use them effectively
- maintaining confidentiality within legal requirements
- closing the job search and preparing candidates for future assignments
- working within ethical standards of the profession

B. **On a Group Basis**

- organising and administering group programs
- presenting complex data to groups
- maintaining appropriate authority and control
- adapting 'individual' issues and procedures (see 2A above) to groups
- presenting programs on specific subjects related to outplacement, i.e. pre-retirement, survivorship, career transitions, self-employment

3. **Assessment**, including but not limited to:
- intake procedures and effectiveness
- analysis / assessment of candidate experiences
- interpreting and / or reporting and applying results of standardised measurements
- identifying critical skills and accomplishments
- identifying values that apply to work

4. **Job Search Training**, including but not limited to:
- strategy and planning job campaigns
- research methods
- networking and other search techniques
- developing résumés and other campaign tools
- developing interviewing skills and protocols
- teaching salary negotiations
- understanding business / economic trends
- evaluating / negotiating job offers
- developing job opportunities
- utilising other resources for support / assistance
- job market data interpretation
- developing / utilising specific employer data

5. **Career Consulting**, including but not limited to:
- developing individual specific career plans with defined goals
- life / work planning
- career change / options consulting
- career decision making
- identifying personal / environmental issues that impact career decisions
- identifying / exploring self-employment options
- mastery / use of career resource information
- interpreting corporate cultures and structures
- developing educational plans to support career goals

International Association of Career Management Professionals,
c/- 5383 Newport Drive, Lisle IL 60532, USA

Monitoring Service Delivery

From the engaging employer's viewpoint, the nature, timing and content of reporting by the outplacement provider should be negotiated in advance of the assignment commencing. The quest is neither to see the contents of career assessment reports nor intrude into the counsellor-person relationship. What is sought is evidence that what has been contracted for delivery is, in fact, being delivered.

The critical aspects on which a form of reporting can be agreed between employer and provider should include as a minimum:

Service quality standards

As providers of career transition support services, the outplacement provider will ensure that:

a) services are accessible to all separated persons being served in the assignment.

b) the career information delivered is accurate and appropriate to the professional level of the people in need.

c) services are delivered in a manner that supports long-term labour market self-sufficiency for the client with regard to career planning and job search skills.

d) the client experiences a continuity of support service and care even if counselling staff change.

e) services are appropriate to the age and personal circumstances of the client.

f) services are tailored to the unique needs of each client.

g) sufficient and current materials are available to support the independent self-help efforts of clients.

h) networks are in place so that referrals are appropriate to client need.

i) the service is updated regularly in order to remain current with local labour market realities.

j) outcomes are analysed and evaluated regularly.

k) the career transition support services will be delivered in a manner that conveys:

- respect for the dignity of each client.

- sensitivity to a diversity of cultural, religious and gender values.
- acknowledgment of contextual issues, especially those underlying systemic discrimination.
- advocacy of clients, including those who are disadvantaged.
- gender neutrality in choice of vocabulary and imagery.

Separation Process Chart for Parting Company

1. DECISION

1.1 Why is termination necessary?

- What is the dominant reason?
- Is it avoidable?
- Are you sure it's legal?

- You must be clear and unequivocal.
- It must be expressed in plain language.
- There must be no doubts and reviews of the decision when the termination is communicated.

1.2 Who is to go?

- Why has the individual been selected to go?

- Redundant position/skill?
- Across the board headcount reduction?
- Closure of Dept/Business?
- No alternative opportunities?
- Early Retirement basis?
- Last In/First Off?
- Competence/performance?

1.3 Have you checked once again?

- Are you clear and in no doubt?
- Is your decision defensible?

- Check employment records.
- Check performance appraisals/ discipline/warning records.
- Check initial employment contract/offer conditions (special deals— golden parachutes etc).

2. PRE-TERMINATION PLAN

2.1 Who should do it?

- Who is his/her immediate manager?
- Is this manager credible?
- Can the manager handle it effectively?

- Best done by person who has managed them.
- If not, what training can be provided?
- How stressed is the manager likely to be?
- What other support does the manager need?
- Will there be impact or will there be appeals?

2.2 Who else should know?

- How and when will other staff find out?
- What is their reaction likely to be?

- Preserve terminated person's credibility and personal dignity.
- Maintain company reputation for fairness and staff confidence in their employer.
- Focus on the survivors. They are your future.
- Statement should be brief and blameless. Stress career transition support to be provided.

2.3 The family and contacts

- How will family find out? What will be the impact on them?
- How will your external contacts find out?

- Ensure they get the right message.
- Use outplacement consultant or work colleague.
- Write severance terms down for spouse/partner to see.
- Will special support be needed? (.ie. local doctor/parish, priest etc).
- Assure customers/suppliers of fair action.

2.4 Any other stakeholders

- Are unions or professional associations involved?
- When should such communication take place?

- Anticipate their attitude/influence.
- Is advance consultation necessary?
- How have they reacted in other organisations and situations?
- Consult HR Dept or Employers' Association.
- Are there special award provisions for such termination? Enterprise Agreements?
- Either simultaneously or immediatiately prior to the termination?
- Avoid delay which causes false information and rumour to create alarm.

2.5 Is the corporate image protected?

- Are the media or relevant politicians to be include in the communications loop?

- Could be appropriate in the case of large scale retrenchments or where government has strategic interest in your business.
- Be alert to advance leaks.

2.6 When should it be done?

- When will cause the least business disruption and trauma for the empoyee?

- Never last thing on a Friday.
- Early in the week, earlier in the day (allows time for follow-up, start of outplacement support).
- Don't allow to 'stew' with no help available or facility for cathartic expression.

2.7 Is the best timing decided?

- Are there sensitive dates or times?
- How long should you delay?

- Avoid—service anniversaries, birthdays, family illness time, bereavements and religious days.
- Don't procrastinate. It may leak or lead to false rumour.

2.8 Where should it be done?

- Can you ensure privacy?
- Will it be relatively easy to control?

(If yes)

- The manager's office (unless this draws unusual attention to the meeting).

(If no)

A 'neutral' office

- So that you can leave if it drags on unproductively.
- Helps preserve person's dignity.
- Avoid prying eyes.
- Avoid contact with others while employee may be distressed (give time to get their composure together).

2.9 When should they go?

- Should they go immediately?
- Is serving some notice in mutual interest?

- Saves face.
- Promotes clean/quick break (start of new future).
- If it is, spell out terms clearly and stick to it.
- Watch out for reaction involving sabotage but be sensitive.

3. THE SUPPORT

3.1 Have you prepared and understood the separation terms?

- What notice?
- What severence pay components?

- Stress the employer's willingness to provide reasonable support to cushion the period of unemployment.
- Awards/contract/industry standards/common law history.

(Consult legal and/or outplacement providers.)

3.2 Check benefits issues?

- Superannuation/sick leave?
- Share option/bonus implications?
- How long will car/home allowances be available?

- Re-payment terms/write off allowance?
- For people on interstate or expatriate postings?

3.4 Are they committed in writing?

- Is all this written down in terms the employee and their family can easily understand?

- Remember you are communicating to a potentially shocked/hostile even litigious employee.
- Check that the words have been looked over by another for clarity.

3.5 Will there be outplacement support?

- What resources will be provided by employer?
- What to be specified to outplacement provider?

- When?—Soon after meeting if a difficult case (may even drive person home).
- Write what really is required from provider.
- Negotiable fee(s).

3.6 Are there special needs?

- Will medical or therapeutic help be needed?

- Check medical record if available.
- Is any history suggesting special support needed?
- Could industrial chaplains or local local community experts be usefully involved?
- Brief outplacement provider(s).

3.7 What sort of reference?

- Is one really needed—or wanted?
- Is employee competent and worthy of good reference?

- Check with legal adviser on current case law regarding references.
- If yes—Prepare and issue.
- If in doubt, seek outplacement provider mediation.

4. THE MEETING

4.1 How expected is the news?

- Fully anticipated?
- Suspected?
- Total shock?

- Have there been previous warnings, performance feedback?
- Rumours of cutbacks/recent reorganisaton?
- No advance warning at all?
- Judge from this what the atmosphere is likely to be.

4.2 What nature of person is the employee?

- Quiet, reserved?
- Outgoing, assertive?
- Volatile?

- You will need to allow for feelings to be expressed.
- Stay calm, empathise, listen, allow emotions to be expressed. Don't defend or vacillate. Don't argue back on objections to termination.

4.3 What is their re-employability situation?

- Easy to find alternative employment?
- Location?
- Difficult case?
- Family/Personal situation?
- Health record?

- If yes—Focus on benefits and practical help through provider.
- Listen. Explore emotions. Stress support package, especially outplacement providers.
- Consider contracting with provider for special help.

4.4 What will your behaviour be?

- Have you read recent material on how to manage the termination interview?

- Try and put yourself in his/her 'shoes'.
- How would you feel/react?
- Focus on solution centred vs problem centred approach to meeting.

4.5 What will you say?

- How will you open the meeting?
- How will you check you are understood?

- Get to the point quickly.
- Work out and practise your words.
- Check to ensure person knows they are being terminated.
- Listen to their questions and reactions.
- Enquire and diagnose.
- Summarise and reflect to help person explore their options.

4.6 How will you handle emotion/anger/rejection?

- How to remain in control of meeting process?

- Use good conversation control skills.
- Be sensitive to the employee.
- Don't vacillate.
- Recognise, appreciate their viewpoint but assert the decision to terminate.

4.7 What pitfalls must you avoid?

- How to avoid lengthy debate on reasons?

- Avoid discriminatory language.
- Don't make promises you can't keep.
- Let person do most of the talking.
- Don't allow excessive time (30 minutes is about right).
- Don't try to explain complex severence terms. Give them in writing.

4.8 What reactions can you expect?

- Cool?
- Violence?
- Shocked?
- Pragmatic?

- The calm response often covers anxiety and suppressed emotion.
- Ensure outplacement provider is close by.
- Keep your control.
- Encourage to look at support when emotion recedes.
- Get professional help if signs of traumatisation (frozen, unable to cope).
- Hear their complaints/denials then get on with practical details of the separation.

5. FOLLOW UP

5.1 What housekeeping arrangements will be made?

- How will office be vacated?
- Company material retrieved?

- Security?
- Car keys?
- Credit Cards?
- Security pass?
- Balance vigilance with sensitivity.
- Employer-confidential documentation?

5.2 How will you follow up progress?

- Who will follow up their progress towards re-employment or self-employment?

- Someone other than the person who terminated them.
- Demonstrate concern to do the right thing.
- Allows chance for authorising further support in extreme cases.

6. FOCUS ON THE SURVIVORS

Remember:
More will be expected from fewer human resources to ensure operational continuity and their continued employability.

- You have a continuing business to manage.
- Publicise news of those terminated who have new jobs.
- Work on morale, need to be wanted, recognition of those who remain.
- State your future vision.
- Assure them there is a future.
- Involve them in forward planning/management to stay lean and effective.
- Consult an in-company career development support expert on a range of strategies.

Separation Process Chart for Parting Company

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HRM Staff as Helpers

When enforced separation from an employer is communicated, many who receive this news—whether expected or not—will approach their HRM staff with the objective of developing a considered set of career options. In fact, many HRM functions are offering this service before the actual termination date, even though an outplacement service provider has been engaged. When HRM staff find themselves in situations as career direction helpers, it can be useful to have a guide for the manner of delivery of this form of help.

Too many employees have spent endless hours, weeks, even years looking outwardly for the perfect career situation They have often by-passed the need to look thoroughly at who they really are and want to be. This outward look has had them focussing on self-defeating beliefs and erroneous information. We call these 'career myths'—believed by many but which are not valid in today's employment scene. Many have just waited for things to happen in their career situation or sought out others who they hope will make decisions for them. People who learn to know themselves through career options planning, grow to like themselves, are self-confident and this 'feeling good' produces positive results for them and for whom they work next.

Career planning workbooks

A critical aid for HRM helpers to guide the employee through a self-review career planning process before their separation date can be found by purchasing a selection from a wide range of published workbooks.

A workbook is a critical tool for the employee's journey to self-confidence. It is usually structured in sections and each section is like a bus stop requiring a pause, self-reflection, before commencing the next. By using it, the employee is growing in self-responsibility and self-accountability for their career future. Hence when they seek counselling help from HRM staff it is important that the helper does not jeopardise this development by taking a directive role or authoritarian posture. More a role of continuing to facilitate the employee's self-determination. To help, but help in a particular way. Counselling by facilitating is the challenge for the HRM helper supporting an employee towards a mature stage of career self-resiliency, which will help them through the impending unemployment period.

The workbook design is essentially a developmental based concept, not a matching process. Users are not led to a list of occupations on which to base their career decisions. They are led to initiate their own career explo-

ration and develop detective, communication and research skills. This requires self-sufficiency in the user, but does not preclude the need for—in fact, encourages—talking to others during the self-search problem-solving journey.

Some people experience difficulty with workbook self-search exercises of this nature. They may want a speedy resolution to their problem, a quick fix. Some will not experiment adequately with the exercises before concluding that they do not need them or that this method is unappealing. Reluctance to commit personal thoughts in writing will deter some. Concerns about sharing personal data with an HRM helper may cause them to fail to extend their own learning boundaries.

The important factor is that reading and thinking about career and life management rarely suffices when considering all that needs to be done to make significant changes in behaviour, attitude and degree of inner well-being about employment transitions. A person who actively proceeds through the exercises in the workbook is learning the value of feeling more in charge of their career direction and enhancing the belief and thereby their self-confidence that their diligence will bring the results they deserve for undertaking this effort.

The helping encounter

It is not unusual for an HRM helper to hear a very wide range of employee issues when they first meet for this purpose. A significant number will be unfocussed. Their career paths have been disjointed and decision making for past changes has often been irrational. Many are experiencing a lack of self-confidence in this subject. After all, it was not on the curricula in their secondary or tertiary education. We now have to do what the education system failed to do—teach personal career management as a living skill.

Many are going through a separation from a partner or recovering from one; others are reluctantly single, widowed or married. The whole person is in front of us, not just an employee. People often have a lack of self-motivation stemming from childhood experiences which has created a negative attitude; a suspicion or mistrust; a feeling of powerlessness in the employer-employee relationship. To endeavour to facilitate an employee in one meeting in these or similar circumstances is simply unprofessional. Rather, the approach should be to arrange a series of meetings—helping encounters as we call them.

The objective of the first meeting is to determine where the person is at in the overall career review process. It is rarely completed within an hour. Outgoing, verbally articulate employees tend to elaborate more in discussing their issues than the quieter, more reserved and less communicative. The latter may need more drawing out through careful questioning. As self-reflection is a crucial part of the career process, you should endeav-

our to secure agreement on what the employee will do and think about before the next meeting.

Sometimes an employee will become emotional when talking about their past and their present lives. Past non-productive patterns of career behaviours will surface; a feeling that time has been wasted; or a realisation by the person that they have been living someone else's agenda. An HRM helper needs to know just how far they should assist in such situations. One needs to know the extent of own skills and what are the limits of appropriate HRM behaviours within your employment environment. Referral to an external expert may be the correct action. To ease into this referral without the employee becoming defensive, the HRM helper could share their views of the benefits of this alternative form of assistance.

The role of career assessment instruments

An HRM helper could usefully become familiar with a range of tools termed Career Assessment Instruments—instruments which can be self-administered and that are reliable, objective and useful for employees. They are 'user friendly' in that the employee can easily understand the vocabulary and themes involved. Instruments serve as jigsaw puzzle pieces—each contributing vital information about self which, when put together with pieces from other instruments, make up a coherent picture of who the employee really is and where they want to move to. The picture from these instruments—we call it a self-assessment summary—is further enhanced by adding in data from discussions with others, surfacing more data from use of the workbook and software, and coaching or counselling discussions. A road map is then established by the employee and decisions, options and alternatives can be evaluated on real data, not conjectured data. Instruments both confirm data to the employee and provide new data; they also reveal the common threads and patterns—the themes essential to the person's uniqueness which must be incorporated in subsequent career action steps.

Instruments by themselves can't tell us where our careers should go but they provide essential supplementary information. To develop the 'whole person' picture, a range of instruments is used. Recording results promotes reflection. Thoughts begin to crystallise when they appear on paper. Insightful information tends to emerge when the instrument requires responses to the prompters within their design. Overall, such self-assessment tools assist the employee in looking at past experiences, clarifying what really matters in both professional and personal life, and providing signposts to the content of their career planning.

Most employees will want to share their results. The HRM helper needs to become very familiar with the instruments and nuances of interpretation. Here again, a non-directive approach is needed. Companionship with the employee while they wrestle with the implication of the data, not telling them the job that fits it.

In addition to empathic companionship and provision of a safe setting for the discussion, the HRM helper can make their most productive contribution by observing and communicating what would profit the employee most from doing a particular self-help activity next. To make this contribution, the HRM helper needs to have an understanding of and appreciation that the specified activities in the workbook design are a carefully determined sequence—well researched and validated, even essential for successful outcomes.

The reward

Helping others help themselves has its special rewards. I'm referring to the gifts our clients (employees) give back to us often without realising it. There is also the factor we are doing our professional job professionally. This benefits your employer.

Reflect on your own feelings as you observe an employee you are helping grow, take action, become more self-resilient (many times claiming that they did all by themselves!). It is like a flower coming into bloom. Of course, some flower among weeds and others are like bulbs which don't break the earth's surface. Carl Rogers wrote in *On Becoming a Person* that his work in creating and applying helpful measures for others stretched and developed his own potential for growth—so it will be yours.

Focus on your successes with individuals—not groups of employees in Departments or Divisions. People just like you and me on their own very personal journey of self-discovery. They are living—not just existing, obeying, complying. Don't 'flag-wave' and intrude into some employees' self-congratulatory posturing. Take your rewards privately—you have earned them by being a skilled helper. (But don't neglect to let your boss know of these successes!)

Invitation

Your opinions and experiences of the procedures recommended in this publication are encouraged. Do contact me at Worklife in Sydney. Your experiences in the processes described may well be a gift which can be passed on appropriately to others concerned about humanitarian care, combined with human resource management effectiveness.

Paul Stevens
Worklife Founder / Director

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Paul Stevens founded The Centre for Worklife Counselling in Sydney in 1979 following a 21 year career in Personnel Management and The Worklife Network— a national and international affiliation of adult career specialists—in 1986. He wrote his first published contribution to adult career development in 1981, Win That Job!, closely followed by Stop Postponing the Rest of Your Life. Over 30 further titles, booklets and career assessment instruments have been published since, the latest being A Passion for Work: Our Lifelong Affair.

Paul's dedication to assisting adults in transition has been recognised in many ways—he is Visiting Fellow in Adult Career Development, University of Wollongong; Keynote Speaker at several USA and local Career Conferences; Fellow, The International Outplacement Institute; Member, Management Advisory Board, New Start AB (Nordic Countries); Member, Board of Directors, International Career Planning & Adult Development Network; Member, Editorial Board, Journal of Career Management (MCB Press); State Committee Member, Australian Association of Career Counsellors. He is consultant to many Private Sector organisations and the Co-Founder of the AHRI Career Development Network (Special Interest Group).

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